OPERATIONAL SERVICES DIVISION

COMMBUYS

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# Purchasing in COMMBUYS - Requisitions & Purchase Orders

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# Introductions

- Name
- From (what agency?)
- Are you a current Comm-PASS user?

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# Class Objectives

After today's session, you will be able to:

- Create a Release Requisition from a Statewide Contract
- Create an Open Market Requisition for an Incidental Purchase
- Create a Solicitation Enabled Release Requisition
- Create a Change Order

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# Project Schedule

**Summer 2013**

- Contract awarded (June) and project launched
- Team ramp up
- Application review

**Fall 2013**

- Functional requirements and design
- Agency readiness program launched
- Vendor outreach campaign launched

**Winter 2014**

- Application configuration and User Acceptance Testing
- End User training
- Agency readiness program continues

**COMMBUYS Go Live Phase I**
**March 24, 2014**
(Comm-PASS retired)

**Spring/Summer 2014**

- Build interfaces to MMARS and other systems
- Ongoing End User training
- Ongoing outreach to municipal governments and other eligible entities

**COMMBUYS Phase II**
**September 2014**

**Winter - Summer 2015**

- Phase III Reporting and Analysis Go Live

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# Overview of COMMBUYS

What is COMMBUYS?

*It is the Commonwealth of Massachusetts' Executive Office for Administration and Finance, Operational Services Division(OSD) web-based Electronic Procurement and Purchasing System, referred to as COMMBUYS.*

*COMMBUYS will replace the existing Commonwealth Procurement Access & Solicitation System (Comm-PASS) bid solicitation system with a fully functional and integrated eProcurement system.*

COMMBUYS puts Commonwealth agencies in the driver's seat, fully automating the procurement process and supporting data-driven business decisions.

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# Procurement Policy Update

**The way departments currently do business with OSD is not changing.**

- Existing OSD policy is not changing.
- Existing Finance policy is not changing.
- COMMBUYS is a new system tool departments will use for procurement and purchasing.
- New COMMBUYS policy will be introduced in March on how departments will use the system for procurement and purchasing.

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# Executive Agency Procurement Responsibilities

- Use all Statewide Contracts, if available.
- Comply with all applicable laws, regulations, policies and procedures.
- Accept responsibility and be accountable for procurement.
- Conduct open, fair and competitive procurements.
- Maintain and update bids (solicitations) and contracts in COMMBUYS.
- Review Contract language and manage performance.

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# COMMBUYS Terminology

| Comm-PASS Term | COMMBUYS Term |
|---|---|
| Solicitation (all types) | Bid |
| Vendor Responses, Proposals | Quote |
| Statewide or Departmental Contract | Master/Blanket Purchase Order |
| Purchase off SWC | Release Requisition |
| Not on a contract or Incidental | Open Market Requisition |
| Request for Purchase | Requisition |
| | |

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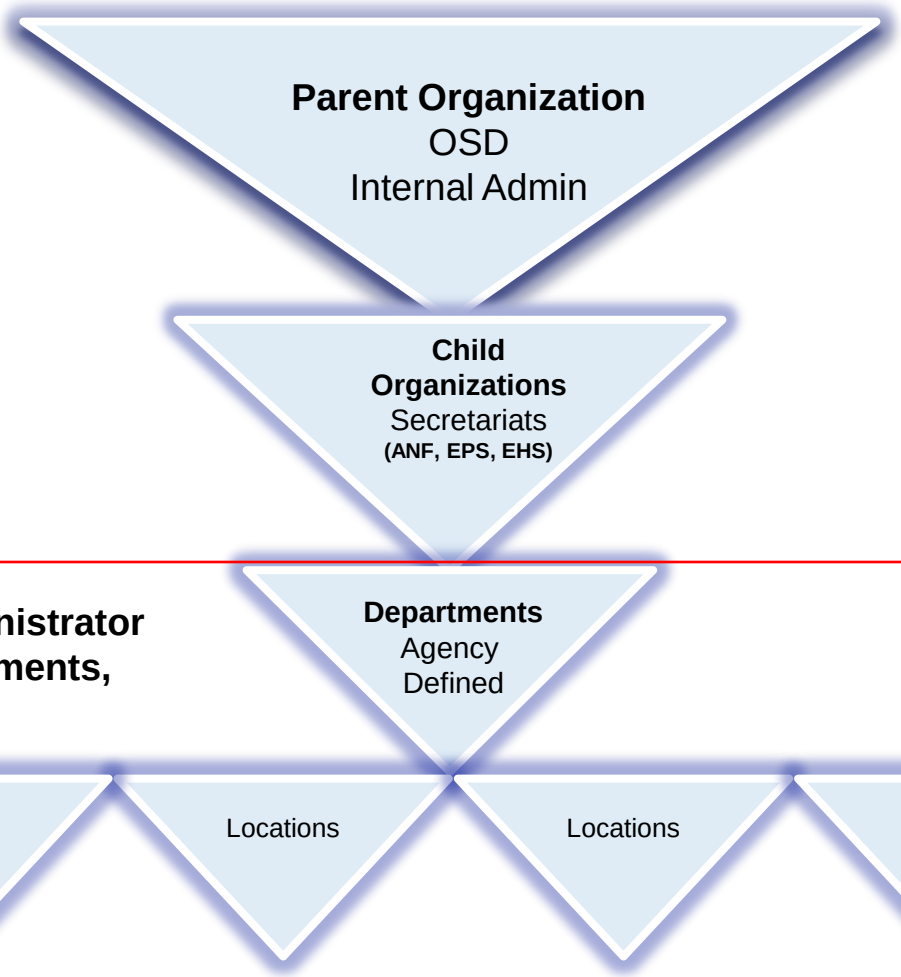
# Organizational Structure

**Preloaded into Commbuys**




**The Organization Administrator needs to set-up Departments, Locations and Users**

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# User Roles in COMMBUYS

| ROLE | Function |
|---|---|
| **Internal Administrator** | • OSD only role; Internal Administrators serve as the top-level administrator within the system and are able to determine which organizations and vendors have access to the system, as well as to manage centralized document and accounting settings, access restrictions and the look and architecture of the system. |
| **Organization Administrator** | • Set-up users in the procurement process for an organization, including its Departments, Locations, users and approval paths. Procurement managers have the role of Organization Administrator. |
| **Basic Purchasing (BP)** | • Create and view all purchasing documents including Requisitions, Receipts, Purchase Orders, Bids and their related documents such as Amendments and Change Orders. |
| **Department Access (DA)** | • Create Requisitions and/or approve the Requisitions of others.<br>• Generates requisitions, solicitations off SWC/ blankets |
| **Inquiry** | • View documents for their Organization, but are unable to control or edit any document. Auditors are given the Inquiry role. Can view fully executed documents (does not include drafts or documents in the process of scoring) but does not allow them to make any changes or take any actions that impact documents or related processes. |

** The difference between what a public user can see and what an Inquiry user can see is that public users never see any requisitions, receipts(phase 2) or the approval audit trail internal to the purchasing organization – using the public view they only see Bids, Contracts and Bid Award.*

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# Approval Paths

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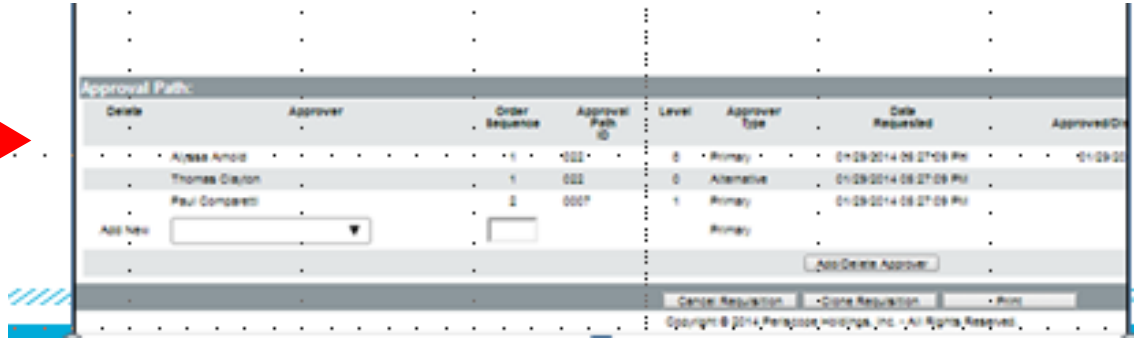
## Original Requestor on Summary Tab

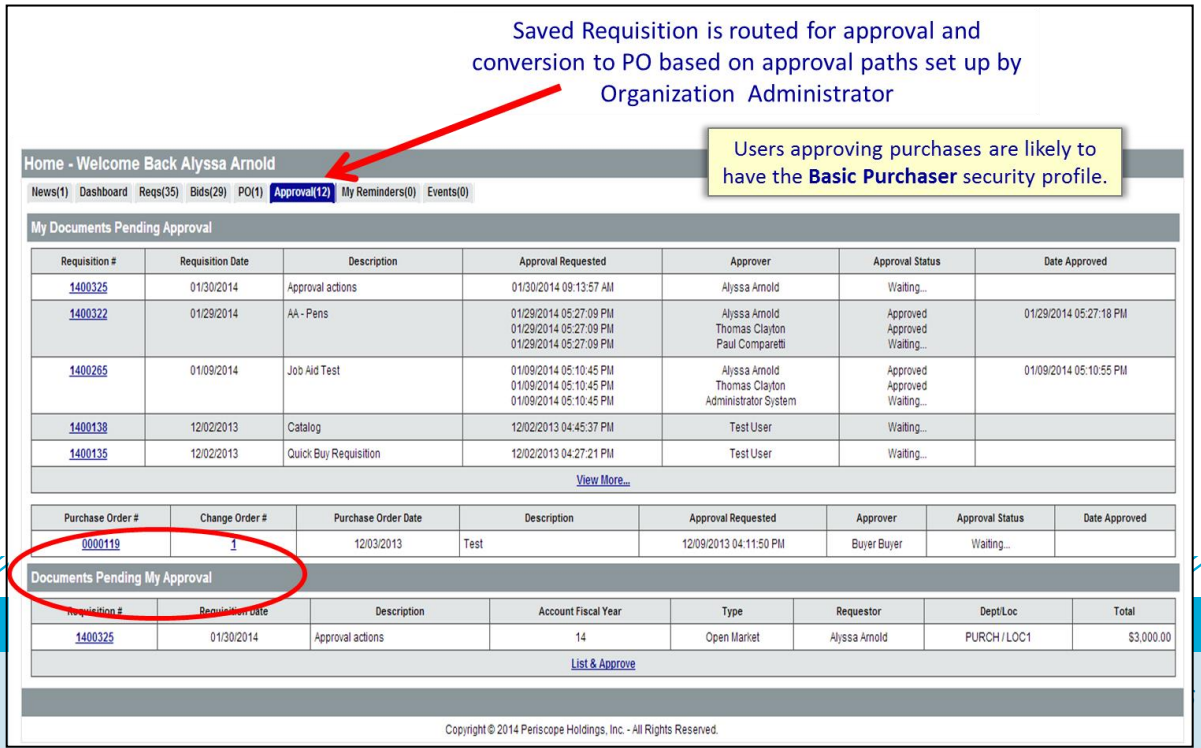
Approval Path appears after Requisition is submitted.




Approver View

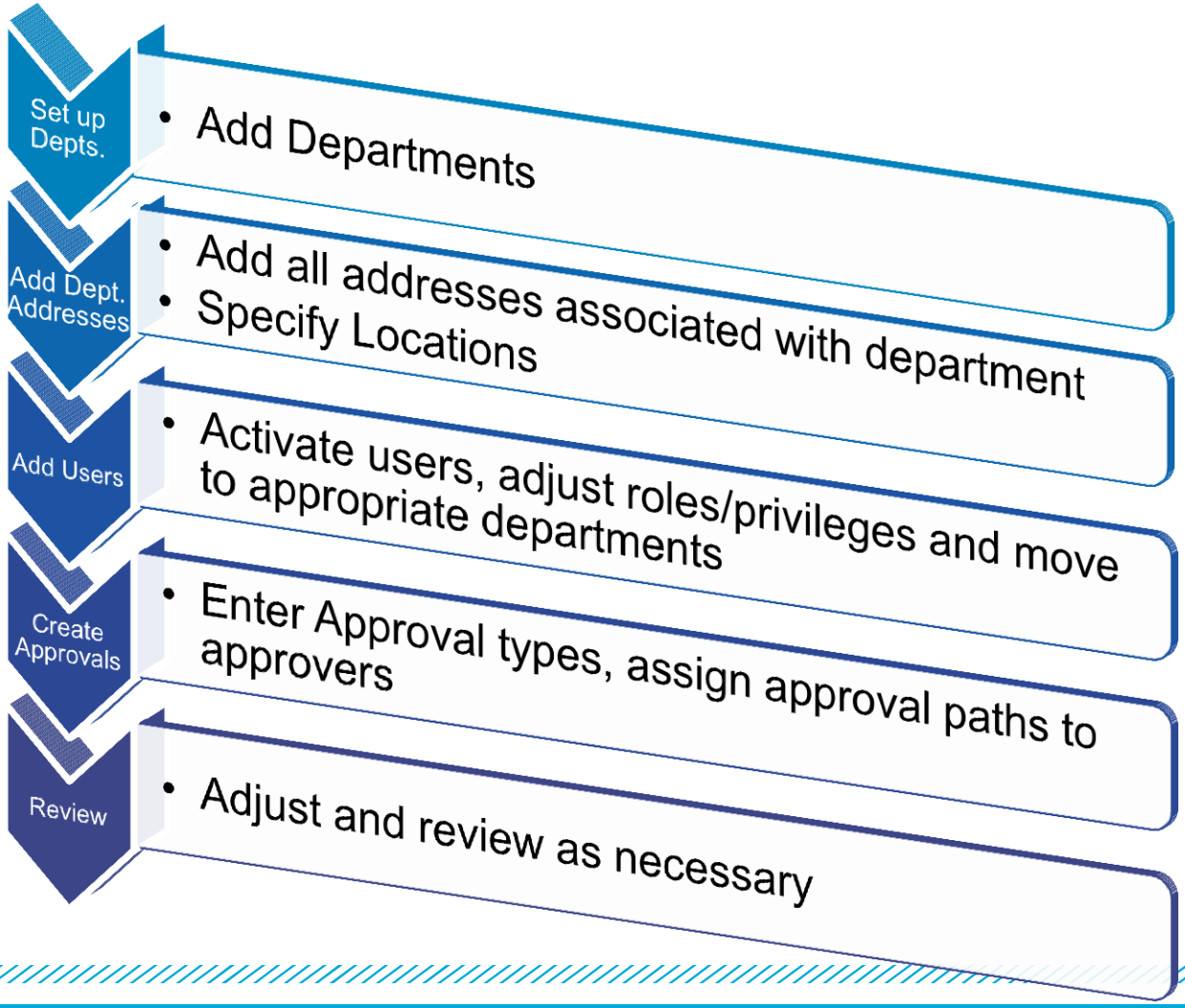
Saved Requisition is routed for approval and conversion to PO based on approval paths set up by Organization Administrator

Users approving purchases are likely to have the **Basic Purchaser** security profile.




Reserved

# OA Basic Set-up Tasks

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# Document Types

| Name | Types |
|---|---|
| **Requisitions** | • **Release:** is a purchase from a Master Blanket Purchase Order/Contract<br>• **Open Market**: is not on a Master Blanket Purchase Order/Contract<br>• **RPA:** is for emergency purchases |
| **Bids** | • **Open**: any vendor can submit a response<br>• **Closed**: only selected vendors can see a bid |
| **Purchase Orders** | • **Open Market**: refers to procuring goods or services not on a contract<br>• **Blanket**: is the terminology for a contract<br>• **G2B**: is a catalog<br>• **Change Order**: request to change a Purchase Order |

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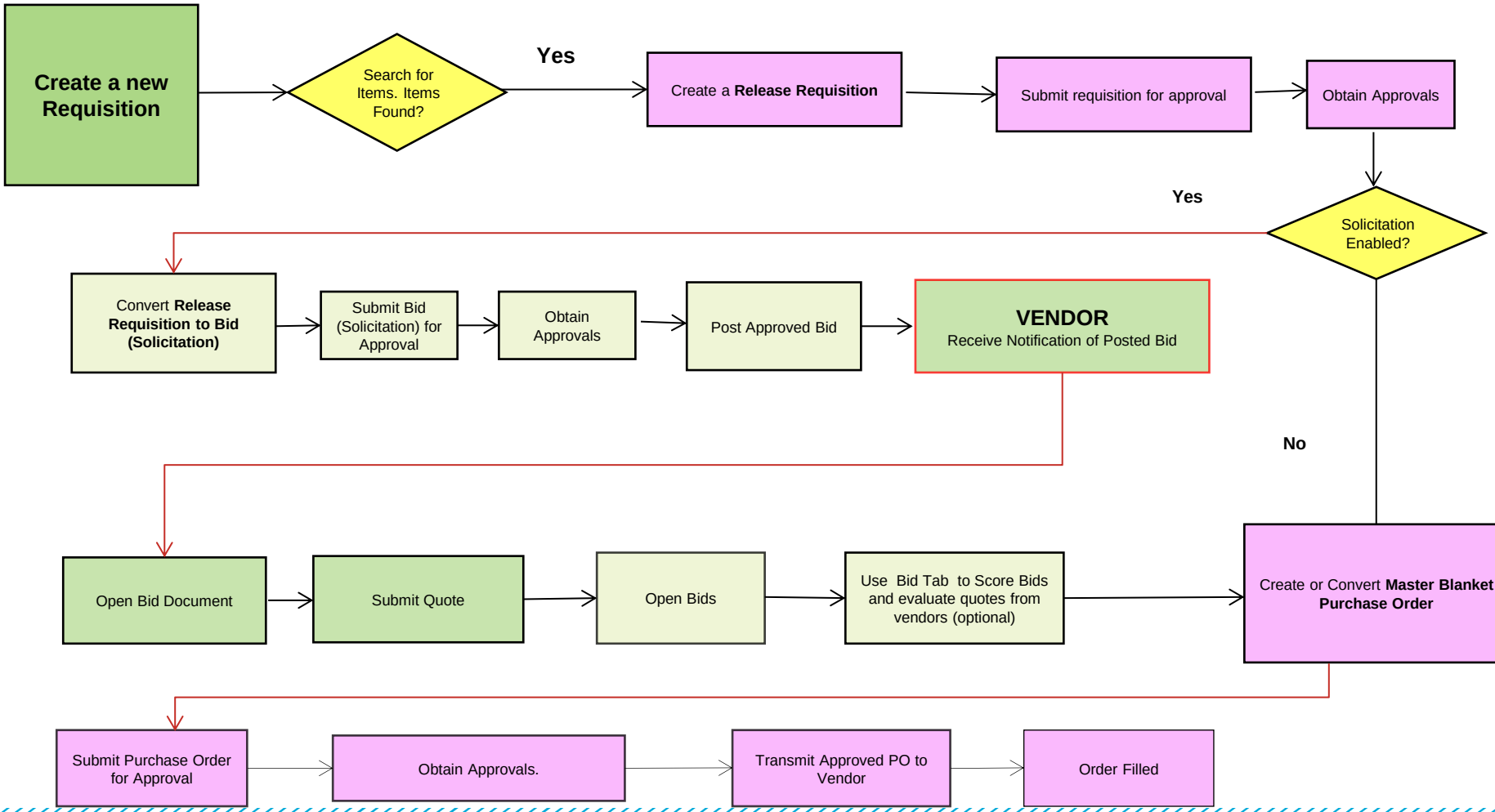
# CommBuys Release Requisition for Goods and Services on a Contract



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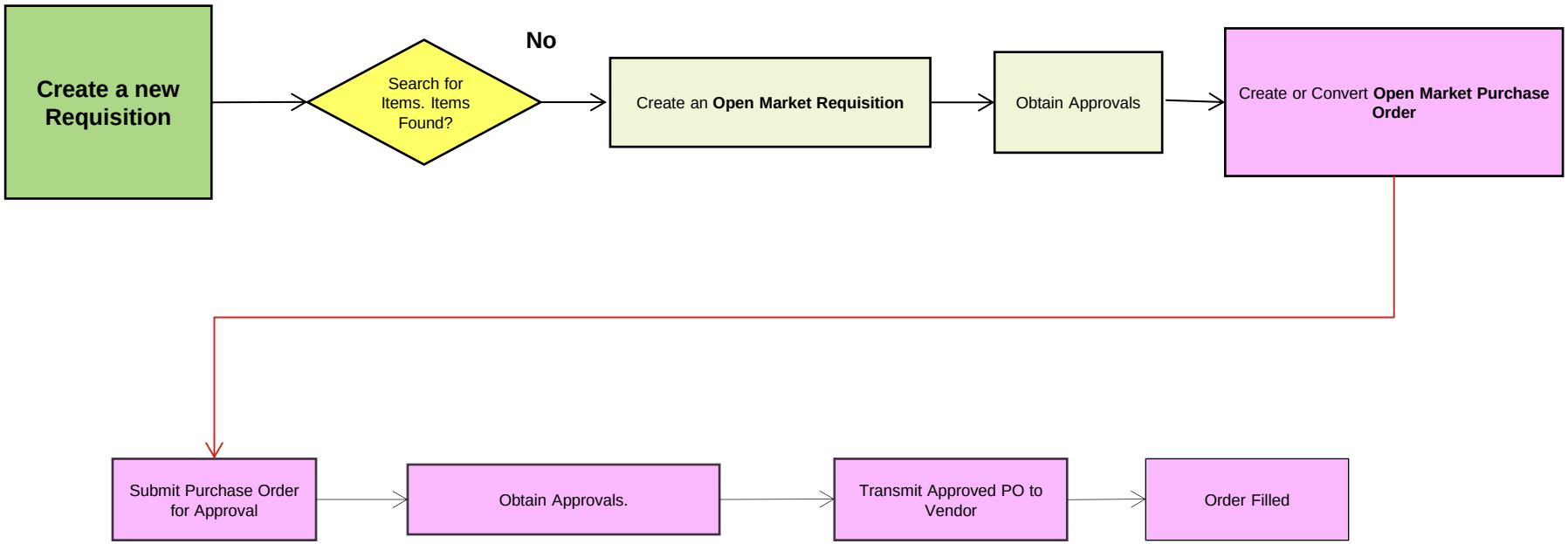
# COMMBUYS Open Market Req Flow Chart For Incidental Purchases Under $10K



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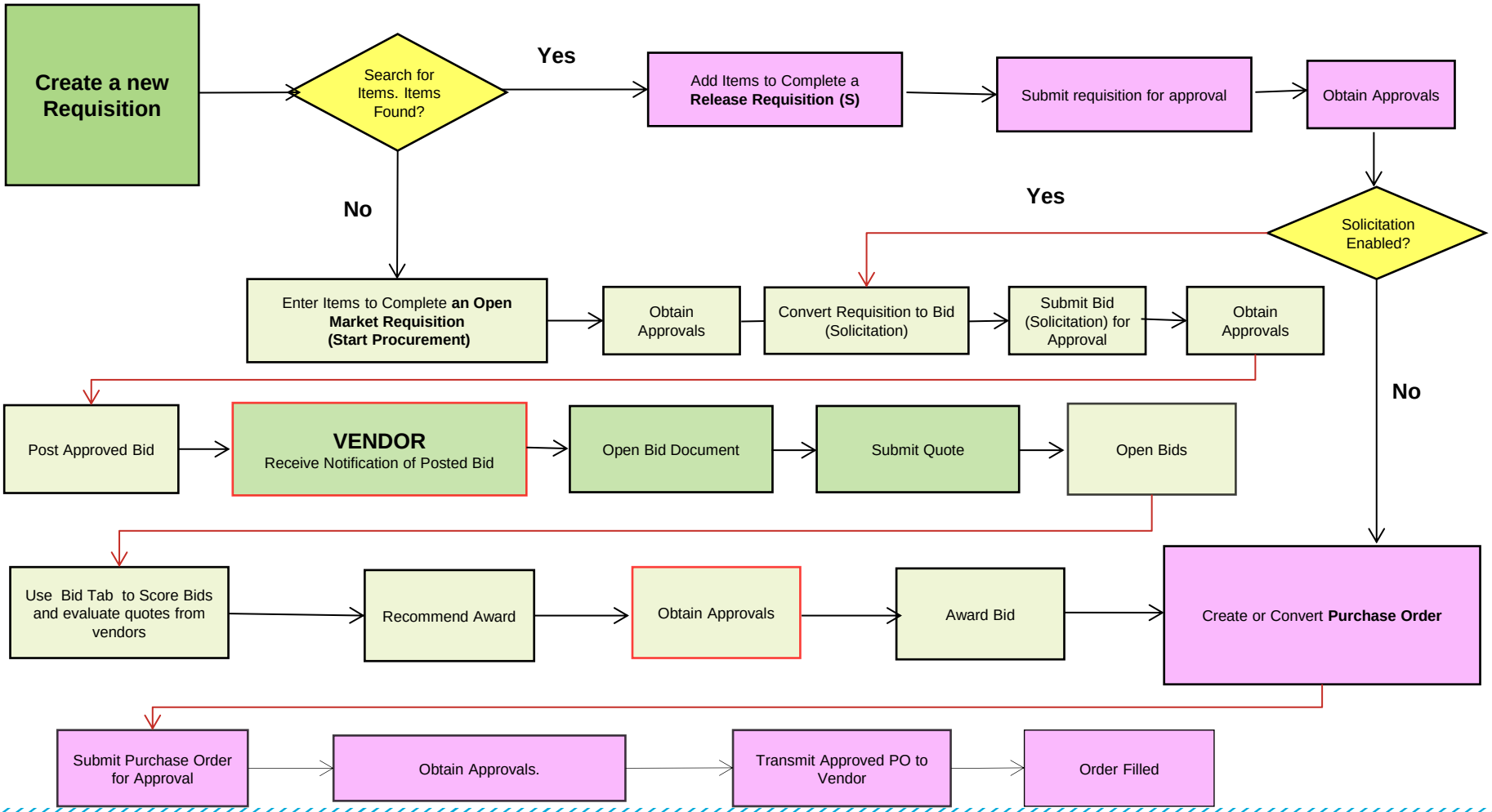
# CommBuys Workflow



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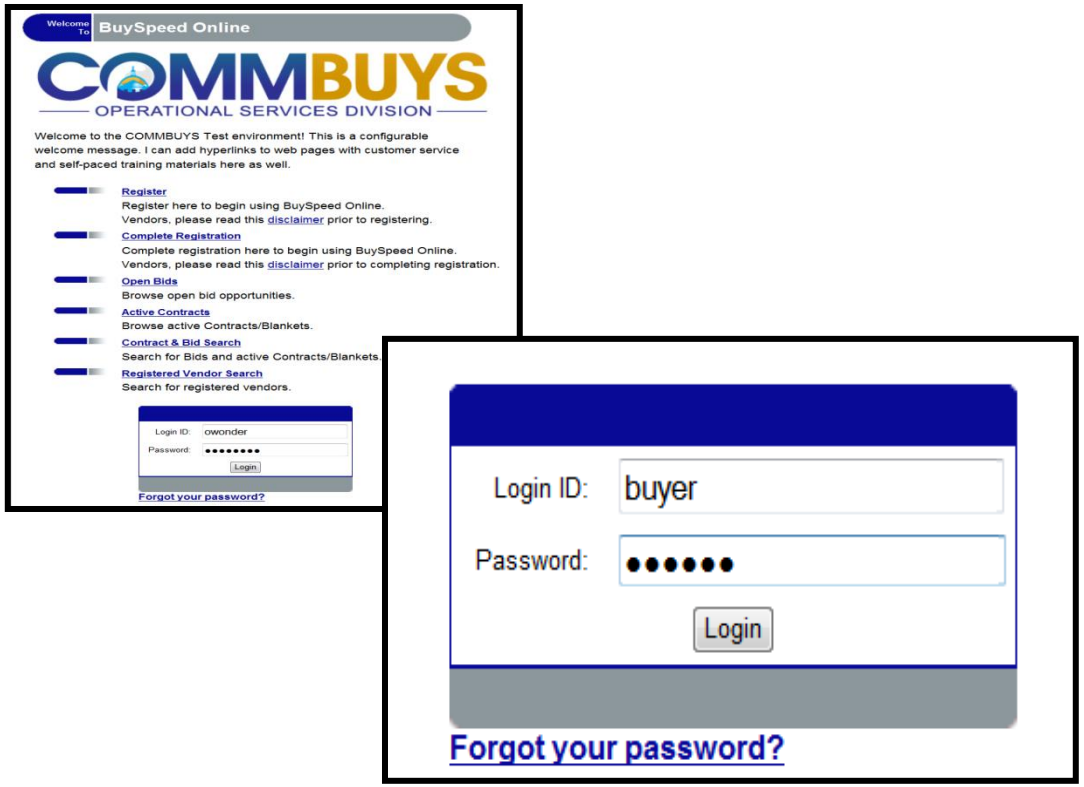
# Initial COMMBUYS Login

- https://www.training.commbuys.com/bso/
- COMMBUYS login page
- Enter the Login ID / Password created during registration
- Click the **Login** button

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**May 1, 2014**
**DCU Center**
**Worcester, MA**

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